

# Strategic Clarity Workbook

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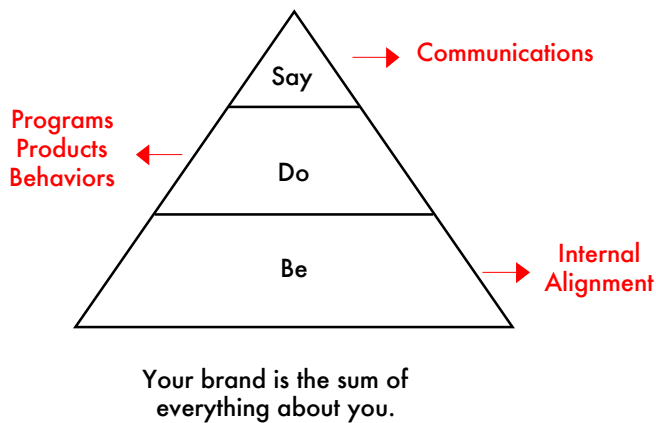
SPIN Academy  
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& Alexis Sanford Consulting

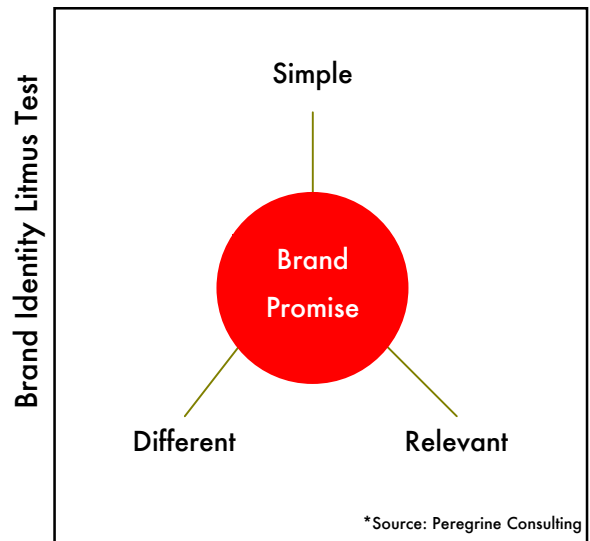
## The Theory: Quick Summary

**Brand:** The core **promise** of your organization.

**Branding:** The **signals** you send to transmit that promise.

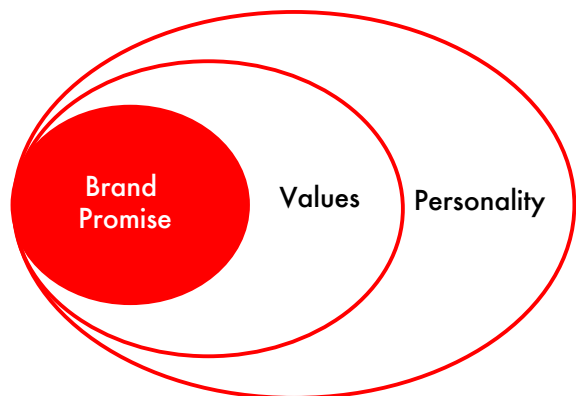


\*Source: Alexis Sanford Consulting



\*Source: Peregrine Consulting

## The Brand Strategy Top 5



Brand Framework = Promise + Values + Personality

1. Brand strategy is a tool for impact.
2. Your brand framework lives in the realm of strategic planning.
3. You must align everything, not just the easy parts. Reconcile the inconsistencies or sacrifice what can't be reconciled.
4. The work of brand strategy takes discipline and focus. There are no shortcuts.
5. A clear brand strategy with a simple, relevant and different brand promise is the foundation for effective communications.

# Hello.

We've created this workbook to help you tap into what makes your organization special so you can see it clearly, crystallize it and commit to it.

By design, each of the exercises on the following pages approach the heart of who you are, what you do and why it matters from a slightly different vantage point. Do your best to complete them without judging or censoring--there will be plenty of time for that later. They are powerful questions that will reveal the raw material you have to work with as you articulate the essence of your brand for the world.

Specifically, the exercises will help you generate the raw material for a brand framework, then cull from what you've come up with to create a working framework for your own organization.

Remember the litmus test that your framework in total should be simple, relevant and different. Once you have a working framework, you'll want to explore it with your internal and external audiences. It's important that your framework be given space and time to evolve. More important than getting it right is the journey to creating clarity for your organization. Time and again, our clients share that it's the process of looking inward, asking and answering hard questions about the organization, and allowing the fullness and clarity of purpose that lives within to reveal itself.

This is a creative process. It takes honesty, courage, reflection and time. It will reward you in exact proportion to what you give it. So give richly. And give with both your head and your heart.

Above all, have fun and take some risks. You'll be surprised where you may find yourself!



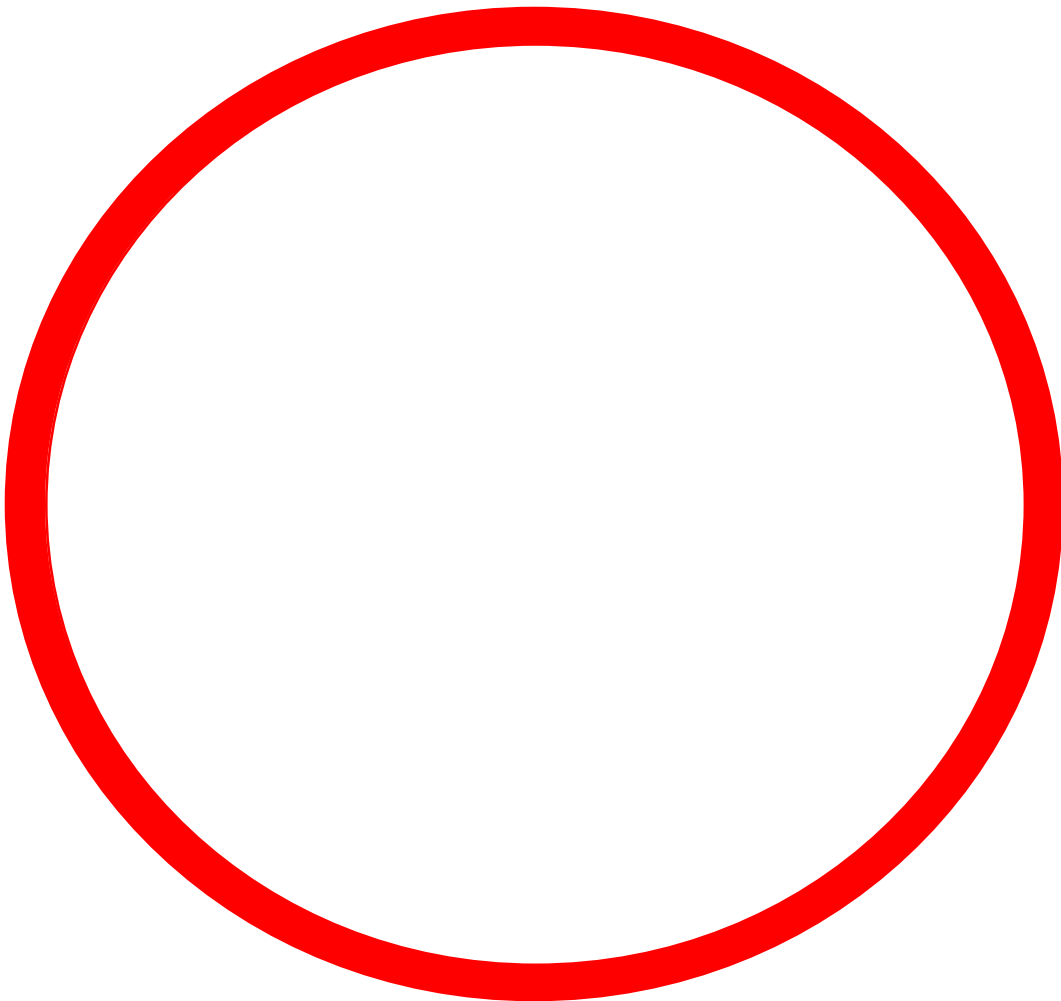
# JARGON PATROL

It's impossible to be authentic when we use inauthentic language. And one of the biggest sources of inauthentic language is jargon...every issue has it, every organization uses it. A first step to using less of it is to become aware of the jargon that infiltrates your particular issue and organization.

## Exercise

Brainstorm all the short-hand words and phrases that you use in your work--the words that you understand on the inside, but which someone on the outside would scratch their head at. Think of how you speak and write in internal memos, e-mails, grant proposals, communications with your members, on your website, in press releases, speeches...all of it.

Now draw a big, red line through the center--these words are off limits, unless there's truly no other language that will do. Refer to this in building your framework and whenever you're writing or speaking, to keep your expression fresh and real.



# N EGATIVE SPACE

Often times it's easier to say what we are NOT,  
on our way to saying clearly what it is that we ARE.

Make a list of all the qualities your organization would never be, or doesn't want to be.

These could be qualities that fly in the face of your values and how you see the world or it could be ways of being or working that you see in others that you don't admire. What are they?

...



Without thinking too hard or censoring yourself, write down as many words as you can that capture the essence of your organization and the work you do.





## ARE TO BELIEVE

Great brands are like great people. They inspire us because they have a clear sense of purpose and clear values. We know where they stand and what they believe in. They are passionate and have a sense of urgency that guides them. It's rare for an organization to articulate the beliefs that drive them...and compelling once they do.

Complete the following sentence at least 8 times--more if you can. Pay particular attention to how you answer when you've run through the obvious responses. What can you learn from how you answer when you have to dig down deep beneath the surface?

*"I am \_\_\_\_\_ [your organization's name] \_\_\_\_\_ and I believe . . . ."*



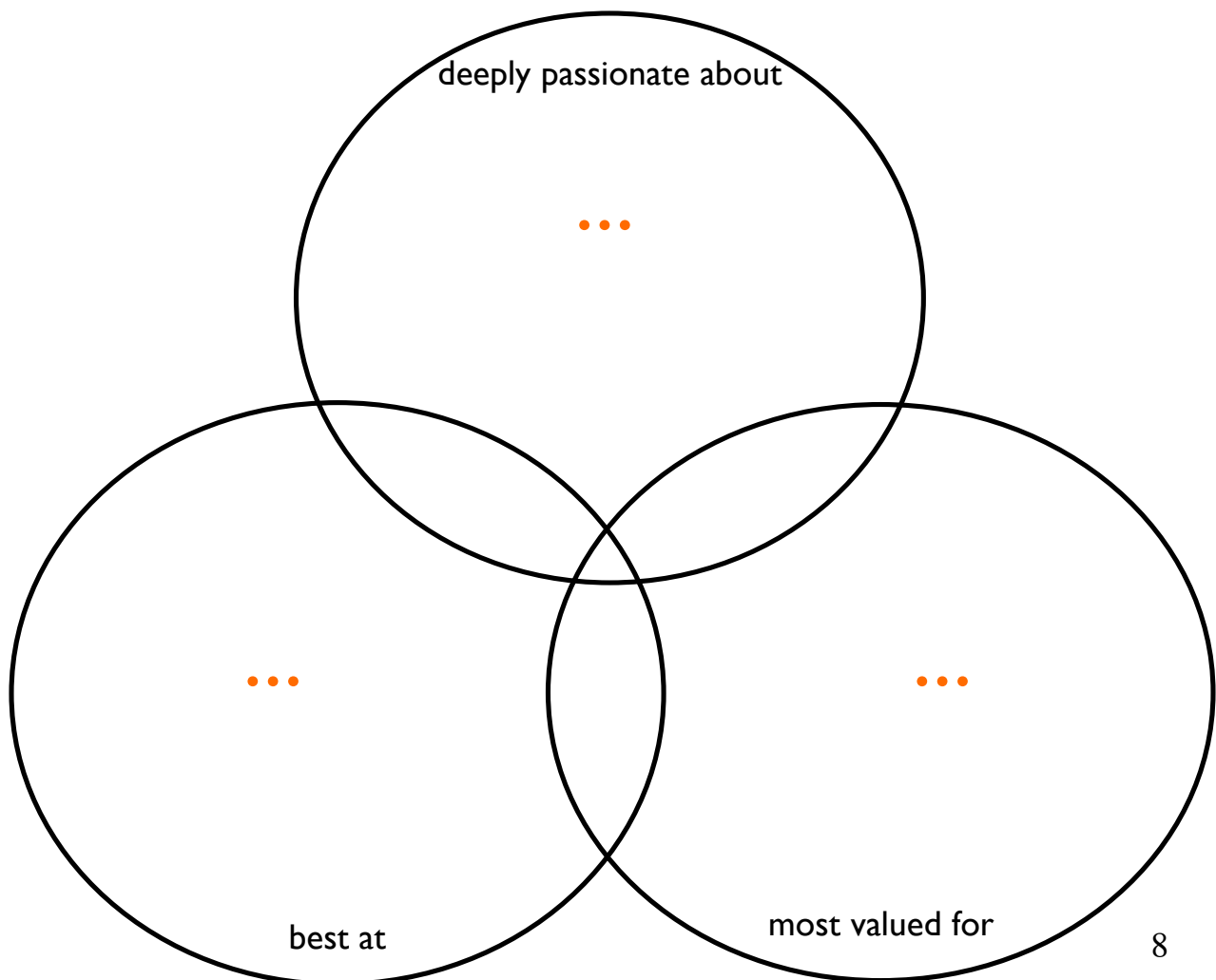
**What in the World can your organization be Best At!**

This not about what you *want* to be best at, but what you actually *can* be best at. Where does the potential for mastery--rather than mere competence--lie?

This may or may not have anything to do with your core competence.

**What Are You Deeply Passionate About?** What ignites your organization's passion? Think about what you are fighting for and fighting against. What you would fight for at all costs. What beliefs do you hold about what is possible and what you want to make a reality.

**Why do your clients/funders/members value you?** What do they most value you for and give you resources (time/money/referrals) for?





## 3 WORDS (or less!)

Describe the business you are in in three words. You may not use any words in your name or your issue/cause/category. What do you offer?

Examples:

Kaiser Permanente: health and happiness; health and well-being (not sickness)

University of Arkansas: life improvement (not higher education)

Breast Cancer Action: watchdogs for truth



# THE GOOD FIGHT

When we engage fully, it's because we have a clear sense of purpose and passion. We are fully committed. One way to access this level of commitment is to get clear on what it is you are fighting for and what you are fighting against.

Think about what you're fighting for: a change, a future, a possibility, a right, a new reality, a population, new ways of living together, new kinds of community...

What are you fighting against? A belief system, a cultural reality, an entrenched set of behaviors, inertia. (Note: one of our favorite collaborators, a fellow named Mark Barden, talks about the power of monsters in stories to galvanize the community to act on it's collective behalf. Enemies inspire personal action ("I'm going to get him") but monsters threaten the wellbeing of the whole and inspires collective action (King Kong, Beowulf, Jaws... What are your monsters?)



## TAKE IN THE GROUND

Complete the following sentence three times:

In a word, my organization stands for: \_\_\_\_\_.

In a word, my organization stands for: \_\_\_\_\_.

In a word, my organization stands for: \_\_\_\_\_.

(Hint: think of what you stand up for, what you are known for, a concept, issue or achievement you are associated with...)



## TEST OF ONLY-NESS

What makes you unique from others tackling the same issue?

Think about what you do, how you do it, whom you serve, how you show up, the kinds of actions you take that others might not, your track record...)

Now complete the only sentence three times:

We are the only \_\_\_\_\_ that \_\_\_\_\_.

We are the only \_\_\_\_\_ that \_\_\_\_\_.

We are the only \_\_\_\_\_ that \_\_\_\_\_.



## PERSONALITY TEST

We're all used to describing people to one another--the traits we notice (e.g., a sense of humor, a passion for movies, chocolate ice cream, driving too fast), the qualities we admire (loyalty, generosity, creative flair for dressing), what they like to do, etc.

Organizations have personalities, too: think of the difference between Virgin Atlantic, Southwest and Delta.

Here's your chance to describe your organization as if it were a person. What quirks does it have? What do people admire about it? Trust it for? What kind of things does it like to do? Does it have hobbies? What kind of car does it drive? How does it dress? What kind of role does it play in the community/job does it have? What does it do to unwind at the end of a long week? Who are its friends? What books does it read? What kind of animal would it be if it were an animal?

You get the idea...have fun and paint a vivid picture.

# BECOMING

Often this kind of work is undertaken at a time of transition when a new, more mature, more vibrant expression of the organization is coming forth.

Think about the transformation of a moth to a butterfly...and then try to describe your organization in terms of what it has been and what it is becoming.

What words describe what or how it has been/how it has acted/moved in the world?  
What words will describe how it will be and what it will do with its new-found and beautiful potential?

Been

Becoming



# WORKING BRAND FRAMEWORK

Now it's time to draw from the raw material of all these exercises and take a pass at your brand framework--using the template on the next page.

**Here are some thoughts to guide you.**

## **PROMISE**

- **Crystallize your brand promise an idea or phrase.** What promise are you making to your audiences? Make this a simple idea that speaks to the head and heart and ideally, is not something your competition can say.
- Don't worry if it's flat-footed or sounds clunky, at first. There's plenty of time to polish.
- Think in terms of *verbs and active language (see next page)*, not nouns and passive language. Remember, a key goal of the promise is to inspire.
- Make sure there is evidence of your already living this promise in the work you currently do.

## **VALUES** (aim for 3)

- **Next add your values.** Which ones are so core to who you are that your organization would be unrecognizable without them. Which would you live by, even if it meant losing money to do so?

## **PERSONALITY** (aim for 3)

- What characteristics make you unique and special?
- Which ones set you apart from others in your field?

In all of this, **STEER CLEAR OF JARGON!**

Use real, accessible, familiar language.



## RAND PROMISE VERBS

**If you're feeling stuck or just want a little help getting started, try out some of these verbs and see if they get any sparks flying for you**

Engage

Inspire

Fight

See

Meet

Empower

Transform

Connect

Unite

Organize

Restore

Champion

Create

Pioneer

Change

Challenge

Renew

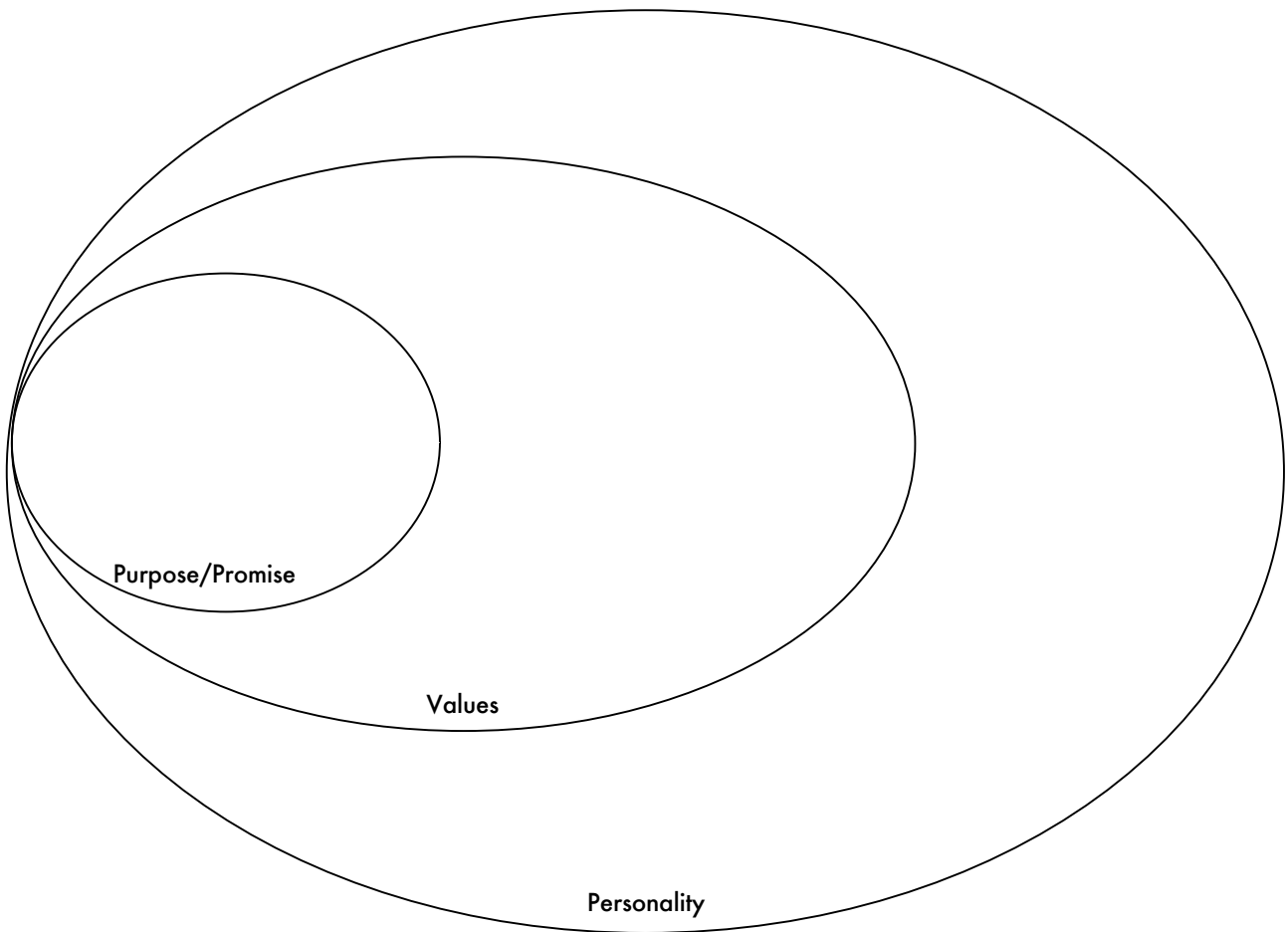
Harness...





# BRAND FRAMEWORK TEMPLATE

**Simple**



**Different**

**Relevant**

## Tips for living your brand

*Here's a handful of ideas to help you create momentum and stay on track once you have your framework. Many of these suggestions will help you understand when and how to apply and your framework and how to refine it, as you start living with it and having it guide your actions.*

1. **BRAND ALTAR:** Consider having each person in the office bring in an artifact that represents for them what lies at the heart of the organization and the work you do together. These can be anything, except examples of communications. Share these with one another and dedicate a space in the office where this 'altar' can live and inspire you in your daily work.
2. **START, STOP, KEEP.** Make three columns on a piece of paper with Start, Stop, or Keep above each one. Think about your organization's behaviors, programs, communications, events. Using your brand promise, values, and personality as a filter, what should you stop doing entirely, start doing, or continue doing to bring your promise to life? Fill in the columns.
3. **BRING THE BRAND ALIVE.** Consider all of the upcoming events, fundraisers, newsletters, meetings your organization has planned. Brainstorm how you can you infuse the brand framework into each one.
4. **MOMENTUM LUNCHESES:** Once you're living the ideas of your framework, get together and share with each other how it feels to live through them. Talk about how you're living the framework in your daily work. Ask for and share stories of what it's like to communicate without using jargon. What's it like to talk to people about your organization's promise. How does it change the conversation? What's easier because of it. What's still challenging? How can you help one another? Consider gathering monthly to establish a rhythm and create some momentum.
5. **SIGNALS AUDIT.** Gather all the communications your organization has done in the last year (advertising, PR, brochures, newsletters, donor correspondence, website.) Sort the communication into three piles: Those that clearly represent the brand in personality, tone and substance, those that are neutral in relation to the brand and those that detract from the brand. What can you learn from each pile? Are there themes in terms of what is working? What is not?

## Continuing Education

Here are a few books to further your exploration of effective brand strategy and branding.

The Brand Gap, Marty Neumeier

*An easy and compelling read that brings to life branding principles. If you only read one book, this is it.*

Brand Simple, Allen P. Adamson

*A very readable book about brands and how to build them. Lots of stories to bring the ideas to life.*

Eating the Big Fish, Adam Morgan

*A book that explores the notion of challenger brands and how they compete with category leaders. Very insightful and offers excellent exercises for developing a challenger identity. Note: the book has just been updated with a lot of new, contemporary case studies.*

A New Brand World, Scott Bedbury

*A veteran of both Nike and Starbucks, Bedbury tells the brand story from the for profit side with good dimension.*

Tribes, Seth Godin

*An innovative thinker about brands, communication and change. This book gives a powerful way to think about the change you are trying to make in the world. Check out his website and daily e-mails: <http://sethgodin.typepad.com/>*

Good to Great and The Social Sector, Jim Collins

*Okay, not about branding per se. But, an easy read that is topical and relevant. Can be read alone or with Good to Great.*

The Audacity to Win, David Plouffe

*An inspiring look at the role strategy, messaging and unwavering discipline play in creating change.*

## Continuing Conversations

Feel free to contact any of us with questions, additional resources you've found, or comments on any part of this process that can be improved:

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